

Quick Start



Guide

Minisoft  
**eFORMz**

# Getting Started with eFORMz

## eFORMz Composer Installation

### Recommendations/Requirements

To run the eFORMz Composer for the creating of an eFORMz project we recommend a PC with the following minimal requirements:

- ◆ 512MB RAM or greater
- ◆ 2 GHz or faster
- ◆ 1024 by 768 with 16bit resolution

### Web Install

From our Minisoft website please register and download the latest eFORMz install. Once the setup file has been downloaded to your PC:

- ◆ Double click the eFORMz executable *eFORMz6\_full.exe* and follow the on-screen instructions. Default install directory is C:\Minisoft\efORMz\_6\ folder.

## eFORMz Sample Projects

When eFORMz is installed on your PC, the following directory is created with 4 sample projects and their associated data files:

\Minisoft\efORMz\_6\Projects\Sample\

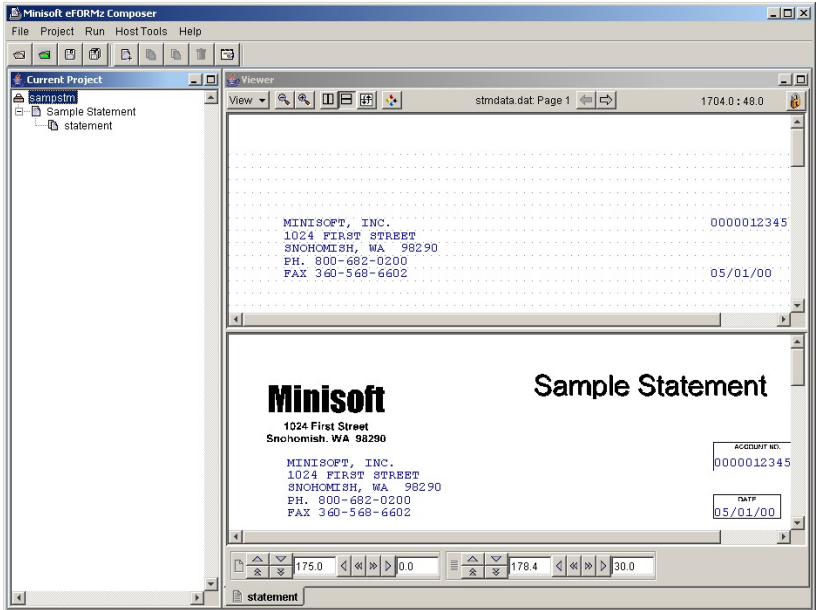
Samples:

- ◆ SAMPSTM.efz - STMDATA.dat - (Statement Form)
- ◆ SAMPINV.efz - INVDATA.dat - (Invoice)
- ◆ SAMPCHK.efz - CHKDATA.dat - (Check and Stub)
- ◆ SAMPPO.efz - PODATA.dat - (Purchase Order)

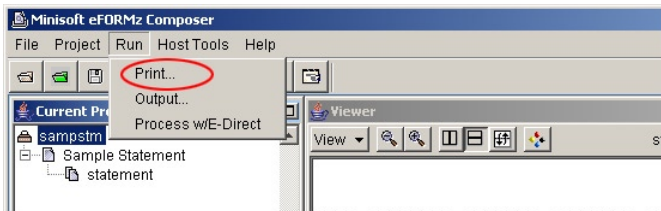
To view and examine the results of one of the above four from your PC:

1. From the main task bar in eFORMz select *File* and *Open Project*. The Open dialog box appears.
2. Open one of the sample projects (example: SAMPSTM.efz) located in the above directory.

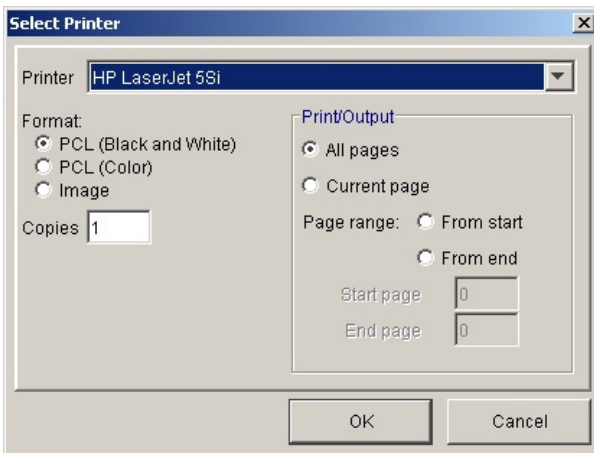
- The eFORMz project file will then display in the Current Project window:



- To print the merged output from the eFORMz Composer select *RUN* from the main menu and then select *Print*.



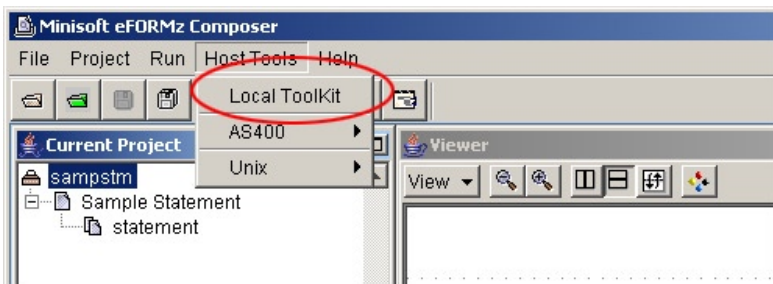
- The *Select Printer* dialog box will display. Select the LaserJet printer you would like to print to and then select *OK*.



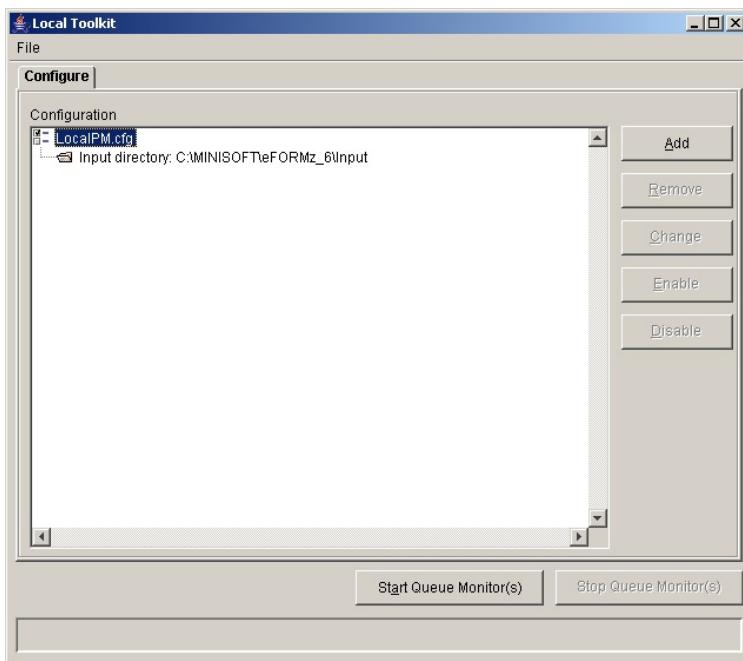
- The merged output will then print to the specified networked printer.

# Automating the Merge Process

To run an automated method of the merge process using the Local Toolkit select *Host Tools > Local Toolkit* from the eFORMz Composer main menu.

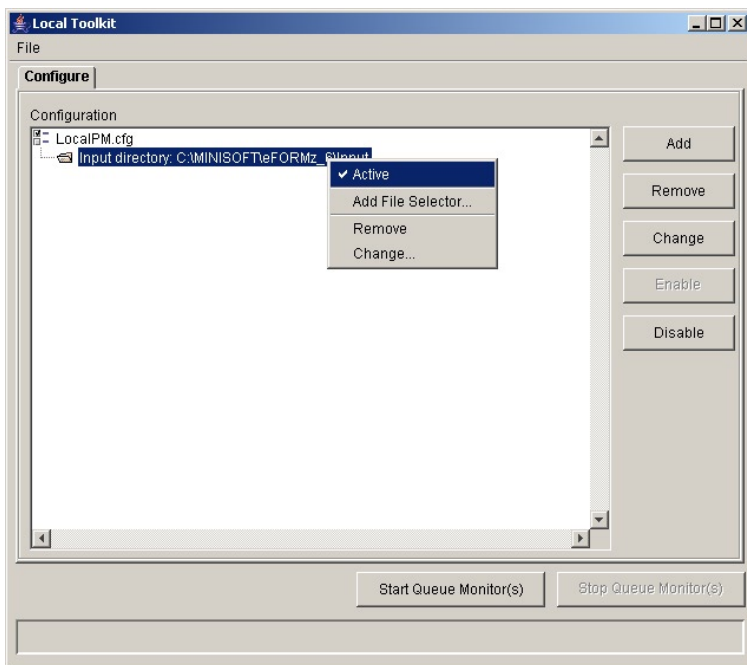


The Local Toolkit will appear with the Configure tab displayed.



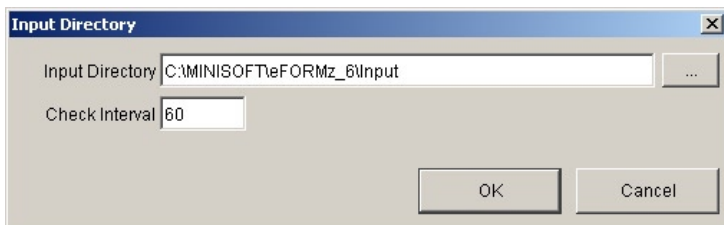
By default, the configuration file name is LocalPM.cfg. The Local Monitor can monitor specified directories for selected files and merge them with an eFORMz project. To configure your Local Toolkit configuration file:

1. Select the *Input directory* field, right click, and select *Change*.



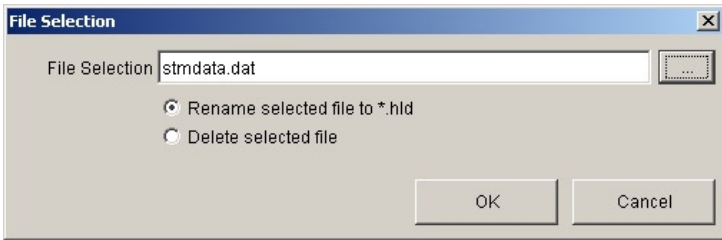
2. The Input Directory is the directory containing your raw data to be merged with an eFORMz project. By default the sample data files have been placed in the *C:\Minisoft\eFORMz\_6\Input* directory.

Once your Input Directory has been specified select *OK*.



3. Next, add a file selection. This will be the data file you would like to merge with a selected project file. *Right click* your Input Directory and select *Add File Selector*.

- Using the browse button navigate to the Input directory (if not already there) and select the file to be merged with an eFORMz project. Select *Open*.
- Your file selection will appear in the *File Selection* field.

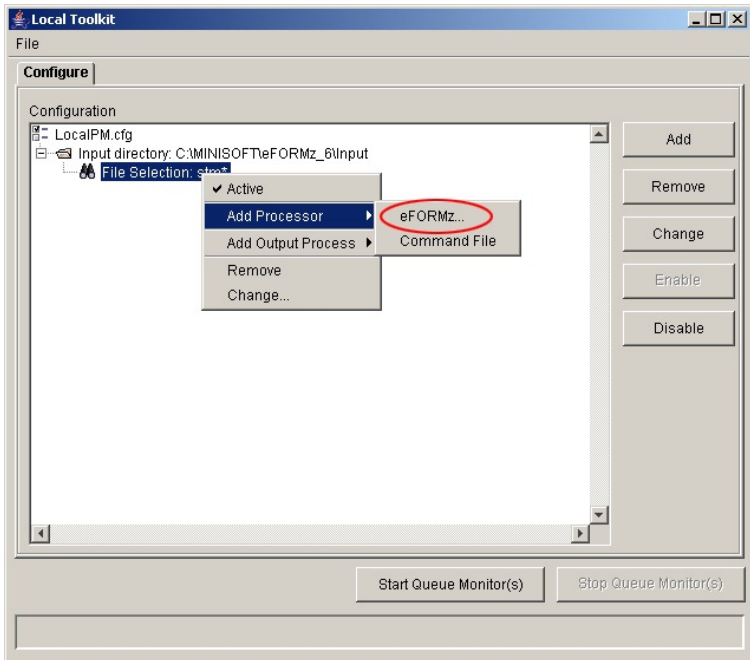


Wildcard (\*) file selection can also be configured, for example:

stm\*  
stm\*.dat

Select *OK*.

- Next, select the project file to be merged with the selected data file. *Right click* the File Selection option and select *Add Processor > eFORMz*.

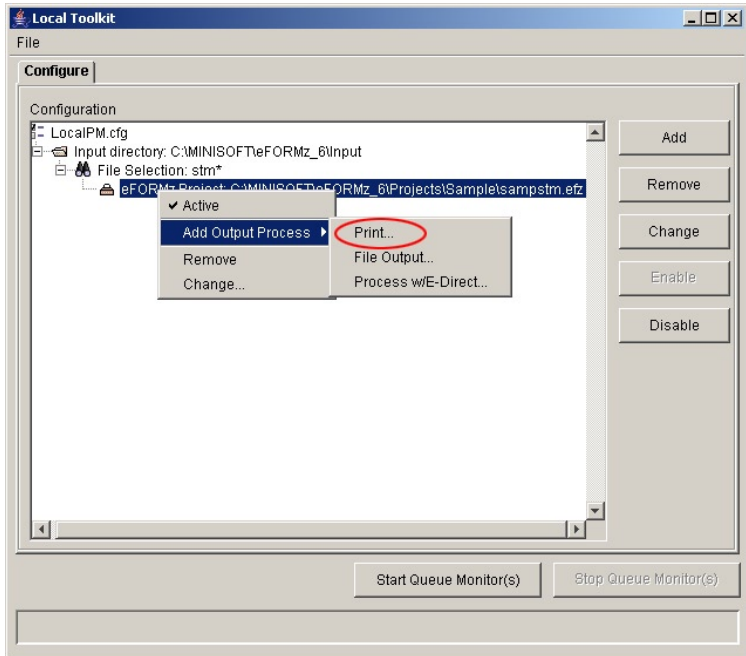


- Using the browse button select the project file to be merged with the selected data file.

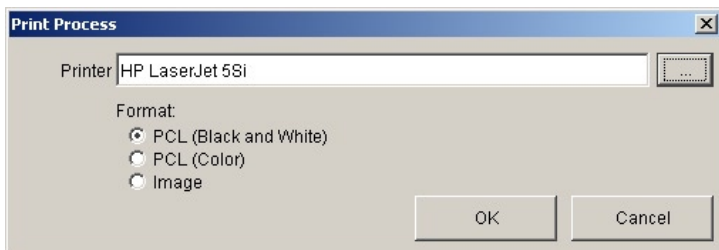


Once entered, select *OK*.

- To print the merged report *right click* the eFORMz Project option and select *Add Output Process > Print*.

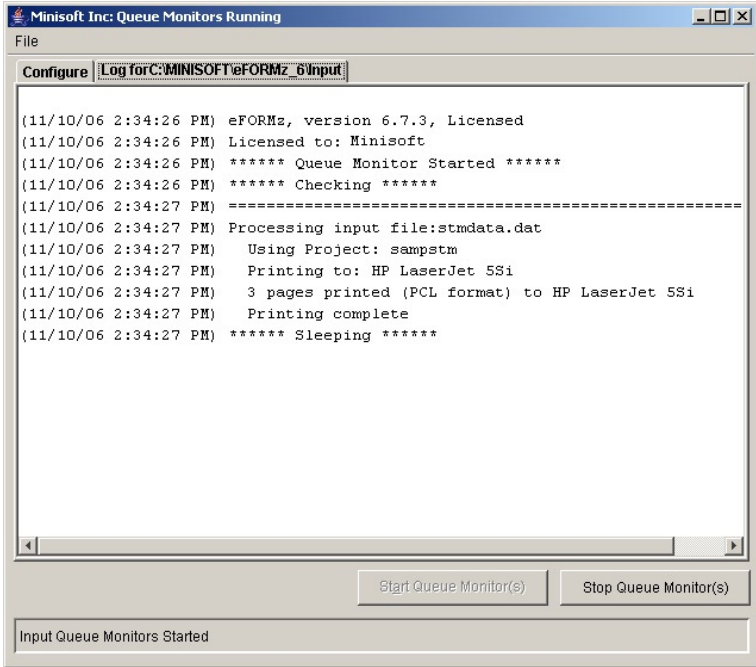


- Using the browse button select the networked printer you would like to print to and then select *OK*.



- Your printer selection should now appear in the Print Process dialog box. Select *OK*.

11. Your automatic processing is now complete. *Select File > Save Configuration.*
12. Select *Start Queue Monitor(s).*
13. Check your logging process by selecting the Log tab that appears when the Queue Monitor is started.



## References

- ◆ See the eFORMz User Manual for further details:  
[www.minisoft.com/pages/business/eformz/eformz.htm](http://www.minisoft.com/pages/business/eformz/eformz.htm)
- ◆ See also, eFORMz Release Notes:  
[www.minisoft.com/pages/business/eformz/pages/releasenotes.html](http://www.minisoft.com/pages/business/eformz/pages/releasenotes.html)
- ◆ See also, Frequently Asked Questions:  
[www.minisoft.com/pages/business/eformz/pages/eformz-faq.html](http://www.minisoft.com/pages/business/eformz/pages/eformz-faq.html)